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Foreign Crops and MARKETS



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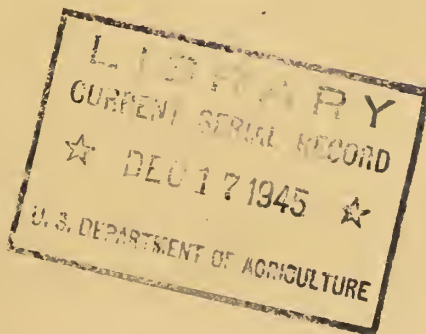
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L A T E N E W S

French food rations for September, October, and November, according to an official announcement, include the following: 350 grams of bread daily (bread rationing ended November 1) and 500 grams of sugar monthly for adults. Rations of milk, reserved for children, old people, and certain special cases, have remained unchanged for a long period. Children up to 6 get $\frac{3}{4}$ a liter (1 liter--1.05 quarts) daily; youths 6-20 and people over 70 get $\frac{1}{4}$ liter daily. Rabbits and poultry are not rationed. Fish is rationed, however, and is distributed according to available supplies, customers being permitted to buy a limited quantity (about 200 grams per person) when purchase is made at a retail store. Adults get 500-600 grams of fats each month. All consumers receive 20 grams of cheese weekly.

Food deliveries to the Paris municipal area, where shortages are most critical, during the week ending October 13, were slightly higher for fresh milk, flour and butter, but were considerably lower for all other categories. Deliveries of wine, eggs, and potatoes declined 72 percent, 64 percent, and 44 percent, respectively. No deliveries of dried vegetables, fish, condensed milk, and fresh meat were made. These items were obtained either from the small existing stocks or from black market sources. Available figures estimate that caloric content of foods received by ordinary workers is only 50 percent of the necessary amount while that of laborers is only 40 percent.

Serious malnutrition is imminent in certain cities of the Saar Valley, Germany, in the opinion of Major General Morrison C. Stayer, Office of Military Government, who accompanied members of the Tripartite Nutrition Survey in a study of nutrition conditions prevailing in Germany. In the American Zone conditions are reported slightly better than last August. General Stayer recommended, however, that the 1550 calorie ration for normal consumers be implemented at once and that local stocks be placed convenient to adequate transportation. In most cities in the American Zone he found rations of 1350 calories were being met. In Ulm, center of a potato-grain area with no nearby vegetables or milk supply, only 1100 calories were being issued in order to eliminate stored foods in houses.

WORLD WOOL PRODUCTION DECLINES; STOCKS LARGE 1/

World wool production has declined materially during the past 2 years from the all-time peak reached in the mid-war years. By 1945 production had fallen to about the prewar level. This decline results mainly from severe drought in important Southern Hemisphere producing countries, less profitable returns in the United States from sheep and wool than from other farm products, and war conditions in Europe. Decreased world production, however, since the early war years has been more than offset by the wartime accumulation of stocks.

World production in 1945 is estimated at 3,760 million pounds, according to preliminary figures, a decrease of 5 percent compared with 1944 and about 12 percent less than the record output in 1941.

Wool production in the Southern Hemisphere in 1945 totaled 2.2 billion pounds, or 65 percent of the world's output exclusive of the Soviet Union and China. Both the Soviet Union and China produce largely coarse wool, whereas the bulk of Southern Hemisphere production is fine and medium apparel wool. Southern Hemisphere production was approximately 2.5 billion pounds annually during the 4 years 1940-1943, an increase of 19 percent above the prewar average. Production decreased 7 percent in 1944 and a further 4 percent in 1945.

Production in the Northern Hemisphere, excluding the Soviet Union and China, in 1945 fell to 1.2 billion pounds, 7 percent less than the prewar average. The decline in the Northern Hemisphere is chiefly the result of the sharp reduction in the United States from the high level reached in 1941 and 1942 and of a more gradual reduction in continental Europe throughout the war period.

Production in North Africa in 1944 was larger than the prewar average, but a decrease is indicated in 1945. The trend in the important Asiatic carpet wool producing countries appeared to be upward as compared with the early war years. Rough estimates of production in the Soviet Union indicated a downward trend from 1941 through 1944, which was believed to have been checked in 1945. For China there is little information available. Increases in occupied China and in outlying territories probably may offset any decreases which occurred in Free China.

SOUTHERN HEMISPHERE

The Southern Hemisphere wool clip, now being shorn, will come on the market in 1945-46. Early estimates indicate important reductions in Australia and the Union of South Africa as a result of the drought. These two countries together with the United States produce the bulk of the world output of fine wool.

Production in Australia, the world's largest wool producing country, has fallen from 1,167 million pounds in 1941, an all-time record, to

about 900 million pounds in 1945. Production is now 9 percent less than the 5-year (1934-1938) average and is smaller than in any year since 1927.

Sheep numbers in March 1945 are officially estimated at 105 million head, or 13 million head smaller than on the same date of 1944. The only previous reduction of similar magnitude occurred in 1902 when numbers fell from 72 million head to 54 million in one year.

As a result of this important reduction in sheep numbers in 1944-45 and the large accumulation of wool in Australia, estimated at 1.6 billion pounds at the beginning of the current season, June 30, 1945, wool production during the next few years probably will be smaller than the 5-year (1939-1943) average of 1,150 million pounds.

Wool production in the Union of South Africa fell to about 228 million pounds in 1945, or 3 percent less than 1944 and 4.5 percent less than the prewar average, according to preliminary estimates. These estimates include the relatively small production in surrounding British Colonies exporting through Union ports, namely, Southwest Africa, Basutoland, Bechuanaland, and Swaziland. The trend in wool production has been downward since 1940 and the severe drought of the past year has caused a further decrease. A carry-over equal to 2 years' production was on hand at the beginning of the current season.

Wool production in New Zealand had increased to the record total of 370 million pounds by 1944 and remained at the same high level in 1945, according to preliminary estimates. The carry-over into the current season about equaled recent production.

Argentine wool production in 1945 is expected to equal the 500 million pounds produced in 1944, compared with the 5-year average (1939-1943) of 490 million pounds, and a prewar average of 370 million pounds.

Approximately 30 percent of Argentina's production is coarse crossbred and carpet wool, for which there was less demand during wartime than for medium and fine wool. As Argentina was one of the principal sources of carpet wool imports into the United States before the war, demand for this type is expected to revive in the postwar period. The quality of this season's coarse crossbred clip from the Province of Buenos Aires and La Pampa is expected to be below normal as a result of the winter drought.

Wool production in Uruguay has increased materially during the war, as in Argentina. Production in 1945 is estimated at 137 million pounds, compared with an annual average prewar production of 118 million pounds.

Uruguayan wool consists mainly of medium and fine crossbred. The carry-over into the current season was negligible.

NORTHERN HEMISPHERE:

The Northern Hemisphere, excluding the Soviet Union and China, produces about one-third of the world's wool output, and contains all the large consuming countries such as the United States, the United Kingdom, France, Germany, and Italy.

Production of shorn wool in the United States, the most important wool-producing country of the Northern Hemisphere, fell to 323 million pounds in 1945, the smallest output since 1928. Including an indicated production of a little under 70 million pounds of pulled wool, total production fell to less than 400 million pounds for the first time since 1929.

The downward trend, beginning in 1943, is expected to continue into 1946. Heavy slaughter of mature sheep was continued in 1945, and sheep numbers as of January 1, 1946, will be smaller than in 1945. The chief reasons for the decline in sheep and wool production since 1943 are less profitable returns from wool and lambs than from other farm products, high production costs, and shortage of labor.

In peacetime the United States imports about 35 percent of its wool for domestic consumption, but in wartime imports were greatly increased. Mill consumption of apparel wool took more than 1 billion pounds grease basis annually, for the years 1941-1944, compared with the 5-year (1934-1938) average of 578 million pounds.

Although sheep numbers and wool production increased materially in Canada during the war, production is still small as compared with that of the United States. Output of shorn and pulled wool reached a record total of 19 million pounds, grease basis in 1944, 16 percent more than the 5-year (1934-1938) prewar average. Shorn wool production in 1945, however, fell to 14.5 million pounds, compared with 15.1 million pounds in 1944, according to preliminary estimates. This decrease was the result of fewer sheep shorn, as the average weight of fleece increased to 7.6 pounds against 7.5 pounds in 1944. No official estimate is available on pulled wool production in 1945, but increased slaughterings indicate some increase in wool pulled from skins. Total wool production is, therefore, estimated at 19 million pounds.

Canadian wool production was stimulated during the war by subsidies paid to growers, and the Dominion Government continues to pay half the cost of a bonus of 4 cents a pound on all clean grades of wool grown in Provinces that agree to pay the other half.

Sheep numbers and wool production in the United Kingdom, normally the most important producing country in Europe, exclusive of the Soviet Union, declined materially during the war. A slight increase to 90

million pounds is indicated for 1945, compared with 1944 production of 87 million pounds, 4 percent less than 1943 and 20 percent less than the 5-year (1934-1938) average.

The United Kingdom is normally the world's most important wool consuming country, but in the prewar period produced less than 20 percent of total consumed domestically. During early war years, production represented an even smaller percentage of consumption, as the latter increased to a little over 1 billion pounds in 1940 and thereafter fell to somewhat less than the prewar level of around 650 million pounds.

Although few official estimates of wool production in continental Europe have been published during the war, such estimates as are available for the most important wool producing countries indicate a downward trend in most of the countries of northwestern Europe, including France, the most important consuming country in continental Europe. Some decrease is also indicated for Italy. Spain and Germany apparently increased wool production above the prewar level. Production in southeastern Europe, where coarse wool predominates, also declined to less than the prewar level. An accurate evaluation of wool production in continental Europe during the war will have to await further clarification, but a considerable deficit is evident for the continent as a whole.

WARTIME ACCUMULATION OF WOOL:

The declines in wool production since 1943 in Australia and the Union of South Africa and in the world's most important consuming areas -- the United States, the United Kingdom, and continental Europe -- would be of even greater significance, however, were it not for the large wartime accumulations of wool on hand in the British Empire countries of the Southern Hemisphere, the United Kingdom, the United States, and Argentina. This wool must be disposed of in the coming years along with current wool clips. Wool accumulations result partly from a British-American wartime policy of building up stock piles of this strategic material and partly from the cutting off of Axis Europe from Southern Hemisphere sources of supply during the war.

The wartime accumulation of government-owned wool held by the United Kingdom and United States Governments as of June 30, 1945, totaled about 3,645 million pounds. This includes 3,315 million pounds of British owned wool, the bulk of which was in the Dominion where grown, and 330 million pounds of domestic wool owned by the United States. The United States Government-owned stock pile of foreign wool, which was built up during the war, has been largely liquidated by public auction sales.

Much uncertainty concerning the handling of the large stock pile of 3,315 million pounds of Dominion grown wool owned by the United Kingdom Government on June 30, as a result of its wartime purchase plan, has already been removed by the Joint Disposal Plan recently approved by the Dominion Governments. The Joint Disposals Organization will determine

the quantities of old and new clip wools to be offered each season and will set minimum reserve prices so that the Organization may withhold old wools or purchase new wool not sold at or above the reserve price. This plan is expected to exert a stabilizing influence on world prices as the wool from these Dominions represents over two-thirds of the wool entering international trade channels. As soon as practicable marketing of wool by auction will be resumed. Current marketing of stock pile and new clip wool by auction was not introduced immediately following June 30, 1945, as the necessary conditions of free demand and adequate organization has not been completed. The 1945-46 clip of the Dominions may, therefore, be largely taken up under the present method of appraisement and bulk purchase by the United Kingdom.

The quantity of Dominion wool, owned by the United Kingdom on June 30, 1945, is distributed by country of origin (in million of pounds) as follows: Australia, 2,060; New Zealand, 540; South Africa, 645; and United Kingdom 70. Only 480 million pounds of the total stocks were in the United Kingdom at the end of June 1945.

The opening up of the continental European market, with its postponed demand, will be an important factor in the next few years in bringing about a gradual reduction in the world's wartime accumulation of apparel wool. Continental Europe as a whole normally produces less than one-third of the total quantity of wool consumed and by far the greater bulk of the wool imported originated in the Southern Hemisphere.

In the prewar seasons 1934-35 to 1938-39 direct exports from Australia, New Zealand, Union of South Africa, Argentina, and Uruguay to continental European countries accounted for 44 percent of the 1,741 million pounds exported. Indirect exports by way of the United Kingdom and from wool pulled from sheepskins imported from the Southern Hemisphere countries would raise this percentage even higher.

The problem involved in disposal of government-owned domestic wool accumulated in the United States was mainly one of price, as for sometime the differential between the price of domestic and imported wools in the United States has been in favor of imported wools. This situation was changed on November 27, 1945, when the U. S. Department of Agriculture established a selling price designed to permit resumption of sales of domestic wool held by the Commodity Credit Corporation at prices in line with those for comparable foreign wool. These prices average about 7 cents per pound (grease basis) lower than those under the original schedule. The amended schedule applies only to selling prices and handlers will continue to purchase wool from producers, pools and secondary handlers under the 1945 agreement on the same basis as in the past.

Stocks of domestic wool held by the CCC as of July 1, 1945, totaled 330 million pounds (grease basis), with more than 250 million pounds of the 1945 production not yet purchased. On November 1, 1945, the CCC held 421 million pounds.

WOOL: Production in specified countries, greasy basis,
average 1934-1938, annual 1943-1945

Hemisphere and country	: Average : : 1934-1938 :	1943	: 1944 a/ :	1945 a/
	: Million : : pounds :	: Million : : pounds :	: Million : : pounds :	: Million : : pounds :
Southern Hemisphere	:	:	:	:
Australia	995.3	1,164.3	990.0	905.0
New Zealand	299.3	330.0	373.0	370.0
British South Africa b/	238.6	250.0	234.0	228.0
Argentina c/	370.4	520.0	500.0	500.0
Uruguay d/	118.0	147.9	142.0	137.0
Brazil	38.4	e/ 42.0	e/ 42.5	c/ 42.5
Chile	32.7	35.0	36.8	34.0
Peru f/	19.6	18.9	18.9	16.8
Other South America g/ h/	10.9	10.1	10.1	10.1
Total Southern Hemisphere	2,123.2	2,518.2	2,347.3	2,243.4
Northern Hemisphere	:	:	:	:
United States -	:	:	:	:
Shorn	360.4	384.4	347.1	322.6
Pulled	64.7	65.2	71.0	i/ 67.0
Total	425.1	449.6	418.1	389.6
Canada	16.4	17.8	19.3	19.0
Other America j/	14.1	14.2	14.2	14.2
Europe -	:	:	:	:
United Kingdom	108.3	90.4	86.8	90.0
Ireland	17.1	15.3	15.9	16.2
Norway	5.9	k/ 5.8	6.2	6.1
Netherlands k/	5.5	3.8	3.4	2.6
France	37.9	26.9	26.0	25.0
Spain k/	77.4	101.0	101.0	94.6
Portugal k/	15.5	13.7	18.9	18.4
Italy k/	31.0	31.0	27.6	23.0
Germany k/	34.9	45.7	49.9	1/
Czechoslovakia k/	2.7	1/	1/	1/
Poland k/	11.1	1/	1/	1/
Hungary k/	10.8	-	-	-
Yugoslavia k/	33.0	-	-	-
Bulgaria k/	33.0	-	-	-
Rumania k/	43.4	-	-	-
Albania k/	5.0	-	-	-
Greece	17.7	-	-	-
Total Southeastern Europe	147.9	133.2	126.7	96.4
Lithuania k/	3.6	1/	1/	1/
Latvia	5.3	1/	1/	1/
Estonia	2.3	1/	1/	1/
Finland k/	3.6	2.4	3.0	3.1
Others m/	7.0	6.6	7.1	6.9
Total Europe excluding	:	:	:	:
Soviet Union n/	517.0	498.4	490.0	430.1

Continued

WOOL: Production in specified countries, greasy basis,
average 1934-1938, annual 1943-1945 continued-

Hemisphere and country	: Average : : 1934-1938 :	: 1943 :	: 1944 <u>a/</u> :	: 1945 <u>a/</u> :
	: Million : : pounds :	: Million : : pounds :	: Million : : pounds :	: Million : : pounds :
North Africa <u>o/</u> -	:	:	:	:
French North Africa <u>p/</u>	90.8	107.5	107.0	90.7
Egypt <u>k/</u>	6.8	8.1	8.1	8.1
Asia <u>g/</u> -	:	:	:	:
Turkey <u>k/</u>	48.5	63.9	69.6	70.3
Iraq <u>k/</u>	20.0	23.2	24.0	27.0
Iran <u>k/</u>	50.9	45.5	38.5	43.8
Syria	7.9	8.8	8.8	10.5
Afghanistan	15.0	15.0	15.0	15.0
India <u>k/</u>	85.2	85.0	85.0	85.0
Others <u>q/</u>	2.0	2.0	2.2	2.3
Total Asia excluding China <u>n/</u> :	229.5	243.7	243.1	253.9
Total Northern Hemisphere excluding Soviet Union and China	1,299.7	1,339.0	1,299.8	1,205.6
Estimated world total excluding Soviet Union and China <u>r/</u>	3,420.0	3,860.0	3,650.0	3,450.0
Soviet Union	210.0	230.0	<u>g/</u> 210.0	<u>g/</u> 220.0
China <u>s/</u>	90.0	90.0	90.0	90.0
Estimated world total including Soviet Union and China <u>r/</u>	3,720.0	4,180.0	3,950.0	3,760.0

Office of Foreign Agricultural Relations. Compiled from official sources or estimated on the basis of information available. Includes wool produced mostly in the spring in the Northern Hemisphere and that produced in the season beginning July 1 or October 1 of the same calendar year in the Southern Hemisphere. Pulled wool included for most countries at its greasy equivalent.

a/ Preliminary. b/ Union of South Africa and produce of British colonies exporting through Union ports. c/ Estimates of the Buenos Aires Branch, First National Bank of Boston. Earlier years adjusted on basis of actual exports. d/ Based on exports, stocks and domestic consumption.

e/ Estimate based on production in Rio Grande do Sul, which produces about 80 percent of the total. f/ Based on recent surveys of the Junta Nacional de la Industria Lanar. g/ Rough approximations. h/ Includes relatively small production in Bolivia, Ecuador, Paraguay, and the Falkland Islands.

i/ Indicated. j/ Includes Mexico, Newfoundland, Hawaii, Netherlands.

West Indies, Guatemala, Salvador, Colombia, and Venezuela. k/ Revised.

l/ Estimate included in total. m/ Includes countries producing 2 million pounds or less, namely Sweden, Denmark, Iceland, Belgium, Switzerland, and Austria. n/ Soviet Union and China may be found at end of table.

o/ British South Africa included under Southern Hemisphere. p/ Estimates based on estimated total sheep numbers, including untaxed and average weight of fleece. q/ Exclusive of China, which may be found at end of table. Includes Cyprus and Palestine in addition to countries listed.

r/ Rounded to tens of millions. s/ Rough approximation for former Chinese territory including outer Mongolia.

Although WFO-50, which required that practically all of the domestic production be sold to the Commodity Credit Corporation, was terminated August 29, the Government will continue to purchase all domestic wool offered until June 30, 1946. After that prices to growers will be determined largely by action taken by the Government in regard to further support.

The carry-over into the current season in Argentina is estimated at 580 million pounds, resulting in a total apparent supply of 1,080 million pounds. Domestic consumption is placed at 120 million pounds, leaving a record exportable surplus of 960 million pounds, or 7 percent more than in the 1944-45 season, which ended September 30.

Accumulations in Argentina consist largely of coarse or carpet wools which were not considered as strategic material by the important consuming countries during the war. The Argentine Government granted loans to farmers on this wool in 1943, and large quantities were purchased for speculative purposes and stored in Argentina until they could be moved.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS

CANADA'S FALL GRAIN ACREAGE REDUCED

Seedings of fall grain in Canada show a net decline of about 200,000 acres, compared with the 1944 acreage. Wheat seedings are estimated at 480,000 acres, a decrease of 216,000 acres, or about 31 percent less than the fall acreage sown a year ago. Fall rye seedings are placed at 347,000 acres, a small increase over the 1944 figure. Decreases in the rye seedings in Ontario and Manitoba are more than balanced by a substantial gain in the area sown in Saskatchewan.

The condition of fall wheat on October 31 was reported at 81 percent of the long-time average yield per acre, as compared with the condition of 101 percent a year earlier. The condition of the rye seedings was reported at 93 percent of average, or slightly less than a year ago.

URUGUAY'S GRAIN PROSPECTS FAVORABLE

Prospects for the current grain crop in Uruguay are generally favorable and much better than they were last season, according to recent reports. The wheat acreage seeded this year is estimated at about 940,000

1/ This is one of a series of regularly scheduled reports on world agricultural prospects approved by the OFAR Committee on Foreign Crop and Livestock Statistics. For this report the Committee included Joseph A. Becker, chairman, C. M. Purves, Esther H. Johnson, Friedrich S. Straus, and Clayton E. Whipple.

acres, or some 10 percent larger than the 1944 area. The condition of the growing wheat is said to be excellent. A deficit crop last year resulted in imports of about 3.3 million bushels (90,000 metric tons) up to the middle of October. Some further imports were said to be needed to carry the country until the new crop comes on the market in January. Normally the country is on a net small export basis.

Preliminary estimates place the area seeded to oats for grain at about 167,000 acres, which would be 13 percent larger than the 1944 acreage. The acreage sown to malting barley, estimated at about 29,000 acres, is the largest area on record for that purpose and is about 30 percent larger than the 1944 area. Increased activity in the brewing industry is said to have stimulated the cultivation of that crop.

Corn planting is now underway, and present high prices are expected to cause some expansion in the corn acreage. The presence of locusts in the northern zone, with the invasion threatening to extend southward, makes planting of bitter corn advisable. A shortage of that type seed will make planting of only a small area of that variety possible, however.

Grain forage crops have been poor this year, largely as a result of insect damage and early season drought. Green forage crops have also suffered from over-grazing since there has been a shortage of natural pastures.

ECUADORAN RICE EXPORTS SMALLER

Ecuadoran rice exports from January to August 1945 totaled 31 million pounds, compared with 86 million for the same period last year. The reduction was the result of low stocks at the beginning of 1945 and a smaller crop this year. Of 18 million pounds authorized for shipment by decree of September 22, 15 million were for Cuba, and 3 million for Venezuela. A further decree on October 8 authorized 1 million pounds for export each to Curacao and Costa Rica.

ECUADOR: Rice exports by country, January-August 1945, with comparisons

Country of destination	Average : : 1939-1941 :	1943 :	1944 :	January-August	
	: Million	: Million	: Million	: Million	: Million
	: pounds	: pounds	: pounds	: pounds	: pounds
Cuba	3	81	88	56	29
Peru	9	20	29	20	0
Venezuela	10	0	17	5	1
Colombia	6	a/	0	0	a/
Panama	3	a/	2	2	0
Others	5	4	6	3	1
Total	36	105	142	86	31

Compiled from official sources. a/ Less than 500,000 pounds.

In order to retain consumption requirements, rice mills now are required to deliver 30 percent of their stocks to the National Distributor for domestic use. The remaining 70 percent of stocks may be sold either for domestic consumption or for export. The Office of Foreign Commerce, however, will issue export permits only when the Ministry of Economy authorizes rice shipments.

RICE OUTPUT INCREASED IN SURINAM

The 1945 Surinam rice crop now being harvested is about 10 percent larger than last year's return, reported at 1,685,000 bushels (50 million pounds milled), according to estimates from producing districts. Despite the gain, however, no surplus is expected for export, since the increased outturn may more adequately fulfill normal consumption requirements than was possible during the war. Rationing of rice has been discontinued, but ceiling prices are still maintained by Government regulation.

FATS AND OILS

ARGENTINE TALLOW EXPORTS AT REDUCED LEVEL

On the basis of 103 million pounds of animal fats, exclusive of lard, exported during the first 9 months of 1945, total Argentine shipments this year may be the lowest since 1940 and almost 100 million pounds smaller than the 214 million pounds shipped last year. Shipments of tallow and other cattle fats have been at reduced level owing to smaller marketings while pending negotiation of a new meat contract, strikes at the frigorificos (slaughterhouses), and effects of drought on pasture conditions.

Argentina during the war followed a policy of export permits and quotas on animal fats to insure domestic consumers adequate supplies to meet requirements. Export restrictions also were invoked to help in the control of ceiling prices.

On September 14, 1945, supplementary regulations were issued to the previous price control measure. These regulations established new maximum prices at 2.29 cents per pound (17 centavos per kilogram) for inedible tallow at the sellers establishment and at the buyers 2.69 cents per pound (20 centavos per kilogram). These compare with the export price of 10 to 11 cents per pound, depending on grade, f.o.b. Buenos Aires. Furthermore, manufacturers of tallow are to reserve a minimum of 65 percent of their tallow production to fill the requirements of the domestic soap industry.

While an estimate on the amount of animal fats available for shipment in 1946 cannot be made now, improvement of pasture conditions during recent months has brightened prospects.

ARGENTINA: Exports of tallow and cattle fats and oils,
average 1935-1939, annual 1941-1945

Country of destination	: Average:	:	:	:	:	: Jan.-
	: 1935- : 1941 b/ : 1942 c/ : 1943 c/ : 1944 c/ : Sept.					
	: 1939 :	:	:	:	:	: 1945 c/
	: 1,000 :	: 1,000 :	: 1,000 :	: 1,000 :	: 1,000 :	: 1,000
	: pounds :	: pounds :	: pounds :	: pounds :	: pounds :	: pounds
Belgium	6,224:	-	-	-	-	2,857
Bolivia	150:	1,797:	869:	1,195:	53:	117
Brazil	42:	1,219:	659:	7,344:	42,220:	4,310
Central America	44:	3,710:	2,110:	688:	1,834:	760
Chile	2,549:	8,565:	15,906:	17,006:	5,968:	5,734
Colombia	567:	2,714:	5,770:	3,503:	5,955:	4,802
Cuba	754:	8,666:	29,879:	21,627:	4,193:	7,440
Ecuador	218:	763:	1,091:	3,417:	29:	974
Eire	2:	882:	3,053:	-	-	265
France	1,874:	2:	-	-	-	-
Germany	26,298:	2,756:	-	-	-	-
Italy	4,184:	2:	-	-	-	-
Mexico	22:	44:	5,836:	9,420:	5,509:	13,834
Netherlands	15,516:	5:	-	-	-	-
Peru	214:	2,879:	3,847:	7,597:	4,749:	1,065
Portugal	110:	780:	974:	4,830:	1,759:	1,268
Russia	-	2,976:	5,520:	-	-	-
South Africa	64:	796:	2,579:	1,332:	1,468:	119
Spain	2,593:	6,755:	7,915:	2,088:	2,187:	3,016
Sweden	3,340:	3,754:	25,900:	6,955:	4,017:	423
Switzerland	1,825:	6,817:	19,094:	5,787:	5,108:	796
United States a/	19,332:	32,145:	59,447:	11,182:	29,222:	9,178
United Kingdom	35,825:	71,632:	50,862:	54,694:	90,953:	39,965
Venezuela	-	703:	5,051:	2,943:	3,102:	2,317
Others	7,284:	13,801:	2,718:	4,202:	5,747:	4,226
Total	129,031:	174,163:	249,080:	165,810:	214,073:	103,466

Source: 1935-1941 Anuario Direccion General Estadistica Argentine Republic. 1942-1945 from data submitted by the American Embassy, Buenos Aires.

a/ Includes Canada.

b/ Net weight.

c/ Gross weight.

CUBA'S EDIBLE OIL
SITUATION IMPROVES

Arrival of 2.6 million pounds of soybean oil, the largest for several months, and 7.2 million pounds of lard in Cuba during October helped to alleviate the shortage of edible fats and oils.

While the edible fats and oils situation improved, Cuba is still faced with a critical shortage of soap fats. This situation, however, is expected to improve slightly in November. The United States recently granted an emergency allocation of 1 million pounds of tallow and about

900,000 pounds of inedible peanut oil. Major relief will not arrive until early December when a shipment of tallow is scheduled to come in from Argentina.

Greater supplies have eased prices of edible fats and oils, although much of the trade is still carried on at prices over established ceilings. Evasion of established retail prices of lard and soybean oil is general.

Estimated production of peanut oil from the crop now being crushed continues at 10 million pounds. An average monthly output of slightly less than 2 million pounds is expected during the September-February crushing season.

Butter output in October was at the peak during the year but probably did not exceed 300,000 pounds. A large portion of this amount, however, did not reach regular commercial channels. Tallow production for October was probably about 1 million pounds. Cuban lard production for the month was estimated to have been 300,000 to 500,000 pounds. A major portion of it was consumed at the point of manufacture, very little being distributed through normal trade outlets.

TOBACCO

DOMINICAN REPUBLIC HARVESTS LARGE TOBACCO CROP

Production of leaf tobacco in the Dominican Republic during the 1944-45 season amounted to about 36.8 million pounds, or nearly 5 times the extremely small outturn of 7.7 million pounds during the previous year. During the crop years 1939-40 through 1942-43, production in the Republic averaged 21.5 million pounds. Favorable prices paid to farmers for 1944-45 crop leaf, and probable continued demands for export, may encourage larger plantings during the next crop year, according to a report from the American Embassy at Ciudad Trujillo.

Farm prices for leaf from the 1944-45 crop averaged 13.4 cents per pound, considerably above those paid for the previous crop. In recent months, farm prices are reported to have risen to nearly 15 cents per pound. The favorable export outlook is the principal factor resulting in the sharp advance in prices in 1945. During the first 8 months of 1945, exports of leaf totaled 7.4 million pounds, compared with only 2.2 million during the entire calendar year 1944. Algeria and Spanish Morocco have been the chief purchasers of the Republic's tobacco in 1945.

SWEDEN'S 1944 LEAF TOBACCO IMPORTS LESS THAN PREWAR

Sweden's imports of unmanufactured tobacco during 1944 amounted to 11.8 million pounds, or about 20 percent less than the average imports of 14.8 million pounds during the 5-year (1935-1939) period. The United

States was by far the most important supplier during 1944. About 9.2 million pounds, or 78 percent of Sweden's total imports of unmanufactured tobacco originated in this country. Brazil ranked second to the United States in 1944, and varying amounts were imported from Cuba, Turkey, Bulgaria, and Greece. During the period 1935-1939, Sweden's imports of leaf tobacco from the United States, principally fire-cured and flue-cured, averaged 8.8 million pounds annually.

Imports of cigarettes, also chiefly of United States origin, amounted to 1.4 million pounds in 1944. These imports were nearly four times the prewar (1935-1939) average annual takings of 398,000 pounds. Sweden's imports of other tobacco products in 1944, including cigars, cigarillos, and pipe tobacco, were negligible.

COTTON AND OTHER FIBERS

WEEKLY COTTON PRICES ON FOREIGN MARKETS

The following table shows certain cotton price quotations on foreign markets, converted at current rates of exchange.

COTTON: Price of certain foreign growths
and qualities in specified markets

Market location, kind and quality	Date 1945	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria (spot).		Kantar			
Ashmouni, F.G.F.....	11-14:	99.05 lbs.	Tallaris	33.75:	28.18
Giza 7, F.G.F.....	11-14:	99.05 lbs.	Tallaris	Not quoted	
Karnak, F.G.F.....	11-14:	99.05 lbs.	Tallaris	38.50:	32.14
Bombay (Jan. futures)		Candy			
Jarila.....	11-15:	784 lbs.	Rupee	409.25:	15.72
Bombay (spot)		Candy			
Kampala, East African.....	11-15:	784 lbs.	Rupee	850.00:	32.66
Buenos Aires (spot)		Metric ton			
Type B.....	11-17:	2204.6 lbs.	Peso	1300.00:	17.56
Lima (spot)		Sp. Quintal			
Tanguis, Type 5.....	11-17:	101.4 lbs.	Sol.	106.00:	16.08
Recife (spot)		Arroba			
Mata, Type 5.....	11-16:	33.07 lbs.	Cruzeiro	80.00:	13.17
Sertao, Type 5.....	11-16:	33.07 lbs.	Cruzeiro	82.00:	13.50
Sao Paulo, (spot)		Arroba			
Sao Paulo, Type 5.....	11-16:	33.07 lbs.	Cruzeiro	91.00:	14.98
Torreon (spot)		Sp. Quintal			
Middling, 15/16".....	11-17:	101.4 lbs.	Peso	91.00:	18.47

Compiled from weekly cables from representatives abroad.

LARGER JUTE CROP INDICATED IN INDIA

The final estimate of the 1945 jute acreage in India is 2,408,900 acres, or slightly less than the preliminary estimate. The final estimate of the 1944 acreage was revised to 2,104,000. Production in 1945 is estimated at 7,165,535 bales or about 2,866 million pounds, compared with about 2,481 million pounds produced in 1944.

Final reports from Bengal show that an area of only 2,017,700 acres, 79 percent of the licensed area, has been planted. Average yield of fiber per acre is estimated at 1,250 pounds, compared with more than 1,300 pounds for the preceding crop.

The following table gives the final forecast for the 1945 crop and the final revised data for the 1944 crop by Provinces and States.

INDIA: Jute area, production, and yield,
1945 with comparison

Province: or State	Area		Production		Yield per acre	
	1944	1945	1944	1945	1944	1945
	Acres	Acres	pounds	pounds	Pounds	Pounds
Bengal ..a/	1,694,400	2,017,700	2,212,580	2,521,420	1,306	1,250
Assam ..	193,300	181,100	129,600	208,280	670	1,150
Bihar b/	162,900	158,900	97,880	93,800	600	590
Crissa ..	23,900	19,900	19,590	17,550	820	882
Cooch ..						
Behar ..	19,500	21,300	13,362	15,164	699	711
Tripura..	10,000	10,000	8,000	10,000	800	1,000
Total ..	2,104,000	2,408,900	2,481,282	2,866,214	1,179	1,190

Compiled from final official forecast for 1945 crop.

a/ Licensed area.

b/ Includes crop from Nepal.

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